

# GDB Phase 2 Advisory Committee Meeting

11/20/2007

1:30 PM

South Executive Conference Room - Teleconference

Meeting called by: Debi Jackson

Attendees: Debi Jackson, Bryan Dickason, Joe Lopez, Thea Pot-Van Atta, Craig Yamamoto, Judy Hahn, Virginia Miller, Lorie Trapani, Leonard Gude, Eric Thorson, Linda Brown, Sue Rutherford, Vonda Garcia, Nancy Solyn, Rose Sgroio, Cheryl Lenz, Tenia Summerville, Tom Ennis, John Bays, Catalina Mistler, Wendy King, Rosemarie Nabity,

Please bring: Advisory Committee Charter and Gathering Requirements

\* - indicates that the attendee was not present in the meeting.

## Agenda

Introduction	Debi
Review Advisory Charter, Acquire approval	Debi - all
Acquire names & emails of IT Vendors	Debi - all
Discuss requirements/pre-formatted queries	Debi - all
Open discussion / Summary	Team
Review action items	Debi

## Additional Information

Special notes/possible discussion topics:

Next Meeting 4 December 2007

## **Review Advisory Charter, Acquire approval**

The Charter was reviewed and discussed. Cheryl Lenz provided grammar changes and the Committee adopted the charter. Debi Jackson will send the final charter to all members.

**Tasks:** Debi Jackson will send the final charter to all members.

## **Acquire names & emails of IT Vendors**

Debi Jackson requested all members to provide their IT Vendors and IT Staff contact information. This way all IT related issues can be addressed by the IT staff.

**Tasks:** All members to provide their IT Vendors and IT Staff contact information to Debi Jackson

## **Discuss requirements/pre-formatted queries**

A member of the Committee asked if the scope of the project included implementation of Non-Term Academic Years. Bryan Dickson stated no, that issue is a separate project.

Craig Yamamoto wanted to clarify the scope of the project. He requested to speed up the payment process. Debi stated that the payment process is out of scope since CSAC is dependent upon the State Controller's Office for additional support. CSAC will have to meet with SCO to discuss a payment agreement. John Bays reiterated that the main focus of the scope is to provide a real time system to all schools. CSAC is trying to provide a push and pull for information out of the GDS system to automated verses web grants where these functions are manually pulled down by the schools.

Judy Hahn stated that she sent the requirements defined at the previous meeting to the chancellor's office and was informed that PeopleSoft is moving to web services by June 2008. This will help the users on PeopleSoft move towards web services. John Bays stated that CSAC will continue to support batch mode so all current users will not loose functionality.

Judy Hahn asked if the scope of this project included Special Summer Payments. John Bays and Debi Jackson stated that it is not in the scope of this project but needs to be a future project. John Bays asked Bryan Dickason if this topic was to be discussed at the workshop at CASFAA. Bryan stated it was one of the topics for CASFAA. Judy also wanted to ensure that this project would provide staff to view User IDs on all transactions processes for students. This functionality should be included in Phase 2.

Tenia Summerville requested manual payments. She stated that CSAC reports and posts manual payments. Schools can only see results on remaining eligibility. On the real time portion of the project, the system will show the transactions right away.

Final Adjustments functionality that will provide schools the ability to change a student's eligibility. This defect to fix to an automatic adjustment or even re-instate the student. This needs to be discusses as soon as possible.

Lori Trapani wanted to understand how the WebGrants for Students and WebGrants would post the manual payments. The Real Time system changes that we are included in Phase 1 & 2 of the project will show the payment transactions right away.

Lori Trapani request to have more roster views. Debi Jackson asked programmers why a limit. The screen is not limited, to the number of reports/views. CSAC just needs to know the requirements of the new views and we can work on the Screen views. So CSAC will gather additional requirements for more reports and create and store as many Custom reports for roster. Schools will have to provide screen mock ups to have it change.

Using the UC Davis requirement list, the team discussed the various requirement choices. The team discussed each item thoroughly. CSAC will use the XML file format for all queries written. Each school can download that format into their system of similar system. Then each school can generate reports they want/needs.

The ID (SSN or CSAC) should carry from screen to screen.

Add a clear button to each screen so you can easily clear the ID # without having to highlight it in order to enter a new ID#.

A request to build queries with the ability to select specific filters from the selection would allow staff to see everything that was queried on. The query select will include:

- Unpaid
- No need report
- Cal B Fees & Stipend
- Competitive Awards
- Entitlement Awards
- New awards (need 2 E2 transfer)
- Awards on Hold
- Students with XX percent remaining or less with fill in Percentage we want to pull
- Adjustment Reason Codes
- Custom Codes
- New or Renewal

Allow for multiple filters. Allow schools to download after or before filtering. The web service data set then can filter on the client or just download the pre-filtered data.

Schools would like to compare their database to the WebGrants database and pull the following queries:

- Student awarded in WebGrants but not in their database
- Students awarded in their database but not in WebGrants
- Award types that do not match
- Quarterly/ Semester payments that do not match

Some additional requirements include:

- 1) Ability to complete G-42 online (5th Year of Eligibility).
- 2) Ability to do the Cal Grant flip online (change from an auto-accept B to an A and visa versa).
- 3) Improve process for reporting when student has small eligibility of percentage remaining. It often is blocked from update and we have to call to make the change.

The Advisory Committee members also wanted to include Tom Hill's scenarios- in the requirements. They request that CSAC provide:

- an intranet application that pulls all of the grant payment data out of the FAM, and then uses the CSAC web services to pull real-time reconciliation data from CSAC, compare the two sets of data and display any exceptions or un-reconciled accounts via the web browser on an intranet. This will help reduce the number of hours schools currently spend reconciling your FAM against CSAC using WebGrants and printouts.
- an intranet application that automatically pulls new or changed records from CSAC at login, and then displays the relevant FAM data needed to process the student. This will help reduce the amount of time schools spend looking for new or changed CSAC roster records.
- an automated school process that pulls new grants (new to the roster) from CSAC and automatically posts those records to the FAM, and perhaps puts them into a holding queue to be worked by staff at the school. This should reduce the amount of time schools take to award a student in their FAM when they show up on the roster. This should also help in reducing roster changes missed.
- an intranet application that allows school staff to click a button to post a change to CSAC for a student, which is now done with the G-series forms or through Web Grants. This is for schools who still use the paper G forms.

Web services are essentially little remote programming modules or functions running on the CSAC servers that can be called and used by your local office Intranet. If we can tell CSAC the kind of data that is useful to ask for via an Intranet application, as we would use it against our school data, then we can use this opportunity to allow CSAC to build something really useful for the future. Each school could join in as they have the opportunity to upgrade their systems.

Additional requirements include :

- Ability to update CSAC database from the FAM systems via web services.
- Add all WebGrants reports in the Web Services catalog.
- Provide data files in a XML format for schools to retrieve and download for their own purposes

Justin Masters stated in a previous meeting that members need to send Debi Jackson the following information:

1. Type of system they utilize
2. Data flow diagrams showing how their transfers occur
3. Identify an obstacles with upgrades

Tasks:

All members to provide the following to CSAC:

- Type of system they utilize
- Data flow diagrams showing how their transfers occur
- Identify an obstacles with upgrades

Next Meeting

4 December 2007

This meeting will be to review and prioritize the requirements acquired to date.